[S] | Flex

InSight Manual

spillman technologies, inc.
reliable innovation

Spillman® Public Safety Software

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Preface

Welcome to the *InSight 2.0 Manual*.

This manual is written for users about how to use the InSight module, and for administrators about how to set up and maintain the module. The InSight module allows agencies to query both Spillman and non-Spillman agencies for Name, Vehicle, and Property records.

The InSight module, version 2.0, is available to Spillman Flex.

Other manuals

The *RMS User Manual* provided information about the basic features of the software, including how to start and exit, navigate, use screens, search, print, and run reports. The *RMS User Manual* also explains how to use the Hub module, which is made up of the tables used by most users.

The *Application Setup and Maintenance Manual* provides information for the Spillman Application Administrator (SAA) at your agency, including procedures for installing and maintaining the software. The *Code Table Setup and Maintenance Manual* provides information for adding and maintaining your agency's code tables. The *Security Setup and Maintenance Manual* provides information for protecting your agency's system and setting up system privileges.

Windows basics

Before using the software, be familiar with the standard features of Microsoft® Windows®. At a minimum, know how to do the following:

- Use a mouse or keyboard to perform basic tasks, such as choosing menu options and buttons
- Work with windows, such as selecting, minimizing, restoring, maximizing, sizing, scrolling, closing, and so forth
- Work with dialog boxes

If these tasks are unfamiliar, then refer to your Windows online documentation or complete an online Window tour.

Manual conventions

When using this manual, note the following conventions.

Convention	Meaning/Use	Examples
bold	Used for names of options, text boxes, buttons, fields, and other items that appear on the screen.	**OK** is a button on the screen. Click **OK**, or press Enter.
angle bracket (>) between items	Shows the menu option(s) that must be selected, in sequence, to get to a specific option.	From the Start menu, select **All Programs** > **Spillman** > **Spillman Mobile**.
plus sign (+) between keys	Used for keys that are pressed at the same time. Hold down the first key, and then press the other key(s). When a keystroke is available for a mouse action, both the mouse action and the keystroke are presented.	Press Ctrl+E. Click **Close**, or press Ctrl+F4.
comma (,) between keys	Used for keys that are pressed in sequence. Press and release each key, in the order shown.	Press Alt, F, O to open the File Options dialog box.
`Courier font`	Used for displayed text. Used for table names.	The software prompts: `Are you sure you want to delete this record?` Open the Names table (`nmmain`).
`bold Courier font`	Used for information you enter.	Enter the street address, such as **`401 W Sycamore St`**.
italics	Used for emphasis. Used for variable information you supply.	Enter the date, using the *mm/dd/yyyy* format.

The following boxes indicate special information.

NOTE

Notes call attention to information that is of particular importance or that varies depending on a particular condition, such as the way your Spillman Application Administrator (SAA) has configured the software.

TIP

Tips present recommendations, optional actions, and additional ways to perform specific tasks.

CAUTION

Cautions point out actions that might endanger your data or its integrity (usefulness) or cause other problems later.

Features on your computer depend on your software version, modules, and privileges. Actual screens on your computer might vary from the example screens shown in this manual. However, any differences are minor and do not affect the tasks being described.

To find more manuals, visit MySpillman or the Spillman Knowledgebase.

Chapter 1

User Information

Jump to topic:

Introduction

The InSight module allows agencies to perform a single query and receive information from Spillman and non-Spillman databases, including alert codes; scars, marks, and tattoos; comments; and involvements. Use InSight to save InSight returns, subscribe to records, and change InSight settings.

NOTE

If your agency uses the Mobile module, then InSight records can be imported from Mobile to Spillman to create a new Name, Vehicle, or Property record. For more information, see the *Mobile User Manual*.

This chapter describes the following information:

Logging in to InSight

To log in to InSight:

1. Open Microsoft Internet Explorer® and enter the URL to the InSight client in the browser address bar.

   For example, enter **`http://insightbroker.gov/myinsight`**.

> **NOTE**
>
> InSight works properly in Internet Explorer only.
>
> To find out the InSight client URL for your agency, contact your SAA.

   The InSight login screen opens.

2. Add InSight to Compatibility View in your Internet settings to ensure the program runs correctly.

   To add InSight to Compatibility View:

   – In Internet Explorer, select **Tools** > **Compatibility View settings**.

     The Compatibility View Settings dialog box opens, and the InSight URL is populated in the **Add this website** field.

– Click the **Add** button.

> **NOTE**
>
> If the URL has already been added to Compatibility View, then it is displayed in the **Websites you've added to Compatibility View** field.

– Click the **Close** button.

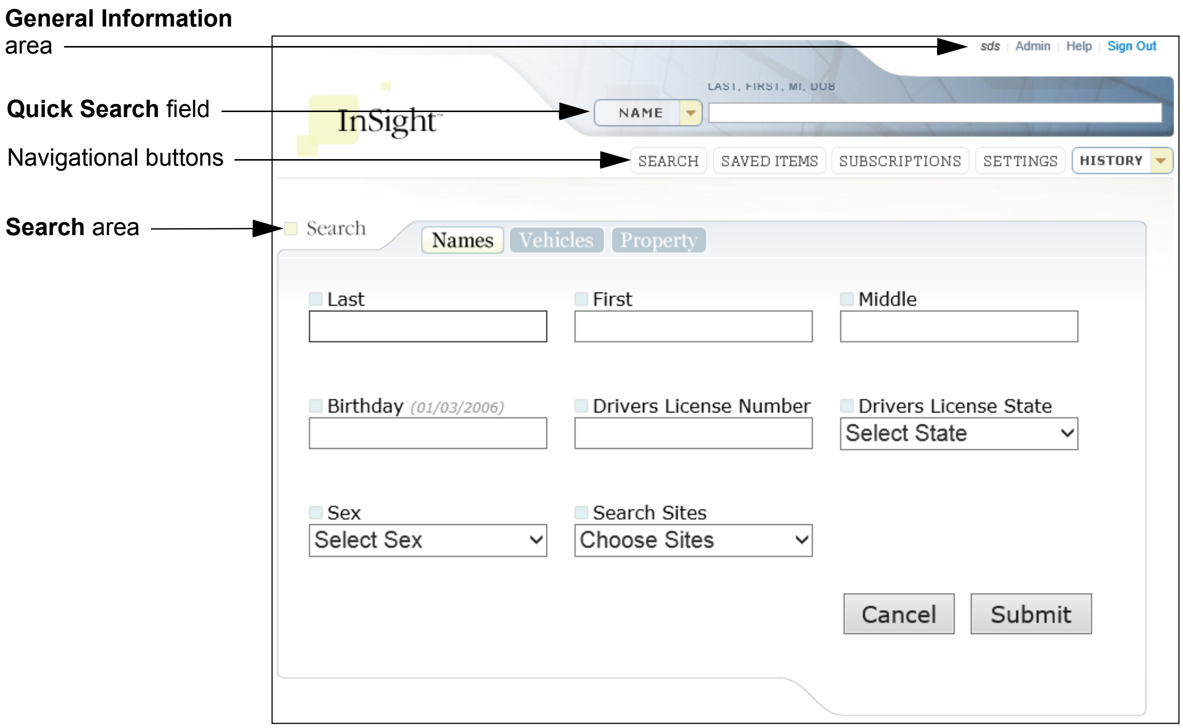
The Compatibility View Settings dialog box closes.

3. From the InSight login screen, in the **User Name** field, enter your username.
4. In the **Password** field, enter your password.

> **NOTE**
>
> Your SAA assigns an InSight password. Passwords can be changed after logging in for the first time. For more information, see "Changing InSight Settings" on page 27.

5. Click **Sign In**, or press Enter.

The InSight Search screen opens.



The Search screen contains the following:

- **General Information area.** Contains the following links:
  - Click the **Admin** link to view the status of connected agencies and a list of users.
  - Click the **Help** link to view InSight help articles.
  - Click the **Sign Out** link to sign out of InSight.

> **NOTE**
>
> Only users with administrative rights in InSight can use the **Admin** link.

- **Quick Search field.** Used to search for records without going to the specific record type search screen. For more information, see “Performing a Quick Search in InSight” on page 19.
- **Search button.** Used to return to the Search screen. For more information, see “Searching for a Record in InSight” on page 15.
- **Saved Items button.** Used to manage saved records. For more information, see “Saving an InSight Return” on page 22.

- **Subscriptions button.** Used to list, and expire, any records that are currently subscribed. For more information, see "Subscribing to an InSight Return" on page 24.
- **Settings button.** Used to display and change the current InSight settings. For more information, see "Changing InSight Settings" on page 27.
- **History button.** Used to display a list of searches from the current session. For more information, see "Using the History Button" on page 21.
- **Names tab.** Used to search Name records. For more information, see "Searching for a Record in InSight" on page 15.
- **Vehicles tab.** Used to search Vehicle records. For more information, see "Searching for a Record in InSight" on page 15.
- **Property tab.** Used to search Property records. For more information, see "Searching for a Record in InSight" on page 15.

Searching for a Record in InSight

InSight can be used to search for Name, Vehicle, or Property records from any participating agency. When entering search information, the same wildcard characters can be used in InSight as in other modules. For more information on using wildcard characters, see the *RMS User Manual*.

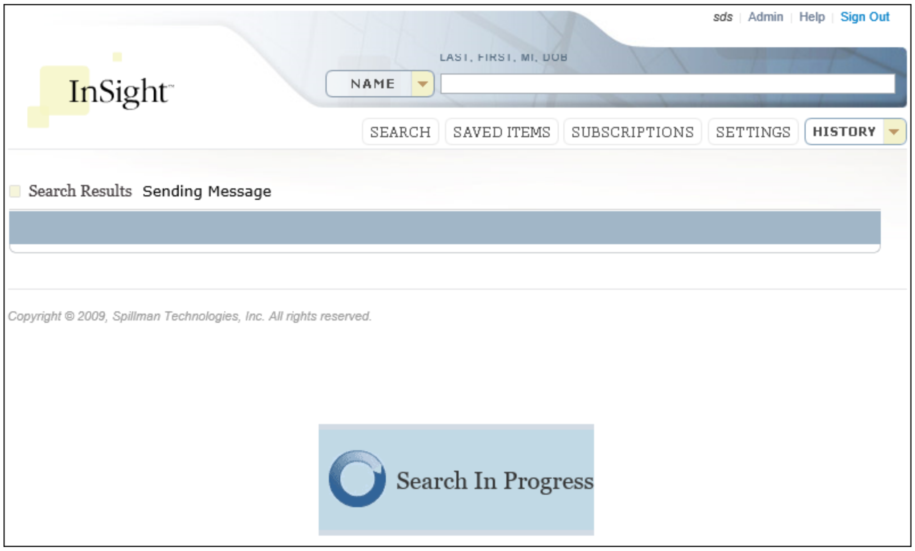
To search for a record in Insight:

1. From the InSight Search screen, select the tab for the type of record being searched.
2. Enter the search criteria. Be aware of the following:
   - In the **Names** tab, in the **Sex** field, select a gender from the drop-down list. By default, both genders are searched.
   - In the **Names** and **Vehicles** tabs, in the **State** field, select a state from the drop-down list. By default, all states are searched.
   - In the **Search Sites** field of any tab, do one of the following:
     - To select which sites to search, select **`Choose Sites`** from the drop-down list, and then click **Submit**. A list of sites and groups to choose from is displayed. Select the check boxes for the desired sites or groups, and then click **Submit**.

> **NOTE**
>
> Clicking the **Submit** button after selecting the desired groups or agencies performs a search. All other search criteria must be entered in the Search screen before selecting the **Choose Sites** option from the **Search Sites** field.

     - To search a specific group, select the desired group from the drop-down list, and then click **Submit**. Groups are determined by your SAA.
     - To search all default sites, select **`Default Sites`** from the drop-down list, and then click **Submit**. For more information on default sites, see "Changing search preferences settings" on page 29.

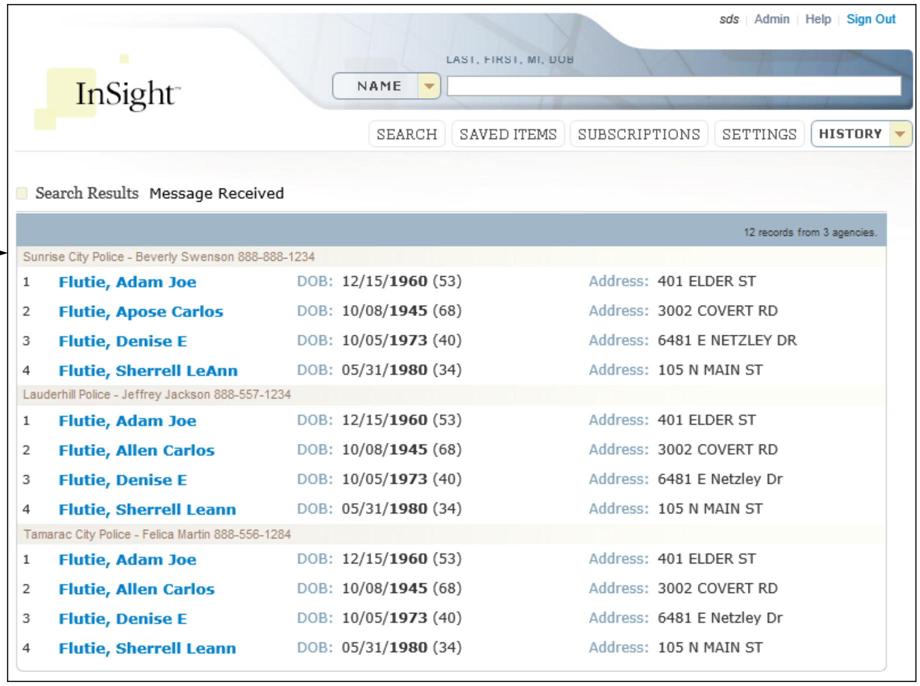
The message `Sending Message` appears and a progress box is displayed.



> **NOTE**
>
> The time required to search varies depending on the number of agencies or groups being searched and the search criteria submitted.

When the search is complete, the message `Message Received` appears and a list of InSight returns is displayed.

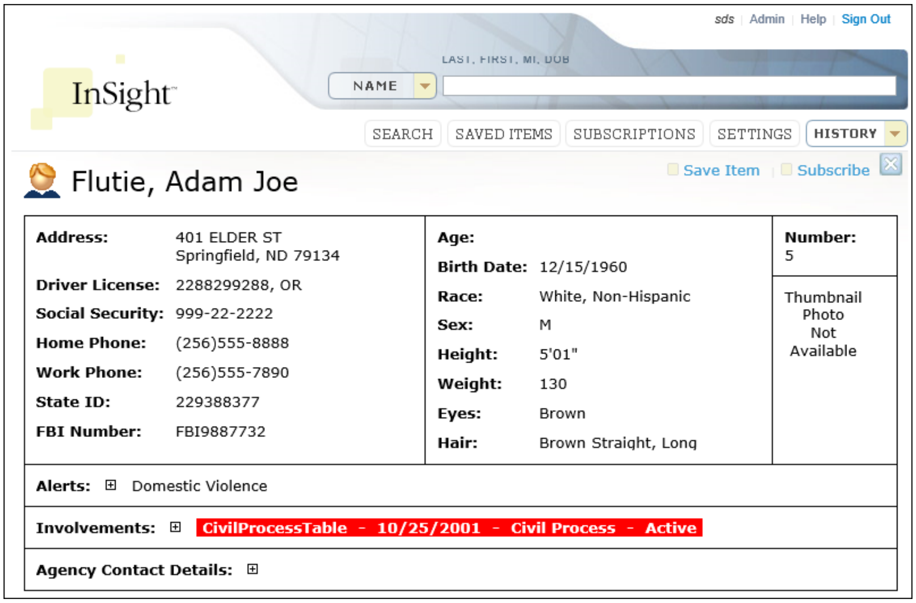
Responding Agency line



The returns are sorted first in the order of receipt, and then alphabetically within an agency. A Responding Agency line separates each agency's returns. The Responding Agency line contains the name of each agency and their contact information.

3. To view more details about a record in the list, click the record.

The selected record opens.



If an image is associated with the record, then the image is displayed in the **Thumbnail** area. If any areas have more information than can be displayed on one line, then a plus sign **(+)** is displayed. Click the plus sign to expand the area.

By default, InSight lists up to 20 matching records from each participating agency. The SAA for the agency can change this number.

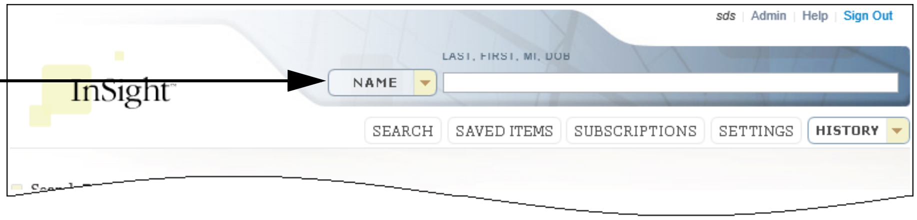
NOTE

If an agency has more than the maximum number of matching records, then refine the search.

Performing a Quick Search in InSight

To search quickly without opening the specific record type screen, use the **Quick Search** field.

Quick Search field



In the **Quick Search** field, enter as much, or as little, information depending on what criteria is known. However, a comma must be used as a placeholder for any missing criteria. The quick search format for the selected search type is displayed above the **Quick Search** field.

For example, to do a Quick Search for a Name record with only the first name Adam and the birth date 12/15/1979, in the **Quick Search** field, enter the following:

```
,,Adam,,12/15/1979
```

If commas are not entered as placeholders for the last name and the middle initial, then the software searches for records with Adam as the last name and 12/15/1979 as the middle initial.

> **NOTE**
>
> The software queries only the default search sites if either **Default Sites** or **Choose Sites** is selected from the **Search Sites** field in the previous search. However, if a specific group is selected from the **Search Sites** field in the previous search, then the software queries only that group.

To do a Quick Search for a record:

1. From the **Quick Search** field, click in the field and enter the shortcut for the desired record type.
   - For a Name Quick Search: Press Ctrl+Left Bracket ([ ). For more information, see "Name record Quick Search" on page 20.
   - For a Vehicle Quick Search: Press Ctrl+Right Bracket ( ]). For more information, see "Vehicle record Quick Search" on page 20.
   - For a Property Quick Search: Press Ctrl+Backslash (\ ). For more information, see "Property record Quick Search" on page 20.
2. Enter the search criteria.
3. Press Enter.

A list of InSight returns is displayed.

Name record Quick Search

For a Name Quick Search, enter any of the criteria using the following format:

`Last name,first name,middle initial,date of birth`

Enter the date of birth using one of the following formats:

- *mm/dd/yyyy*
- *mm/dd/yy*
- *mm.dd.yyyy*
- *mm.dd.yy*

Vehicle record Quick Search

For a Vehicle Quick Search, enter any of the criteria using the following format:

`License plate number,state,VIN`

Property record Quick Search

For a Property Quick Search, enter any of the criteria using the following format:

`Serial number,brand name,model,item`

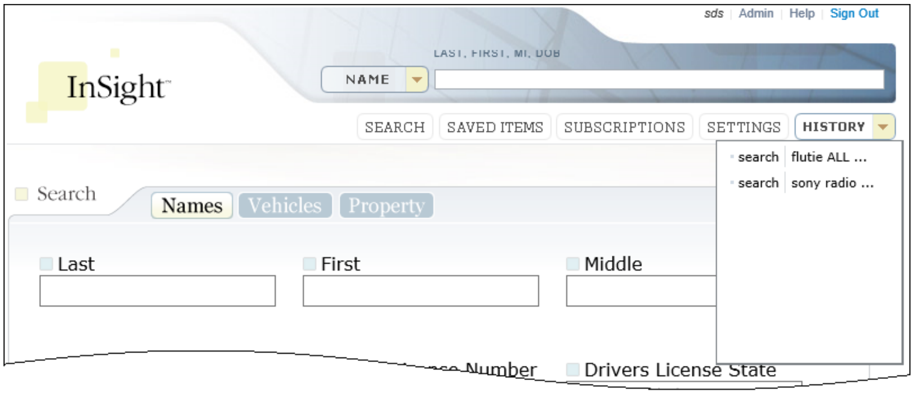
Using the History Button

InSight stores search results from the current session. The results can be reviewed using the **History** button.

To use the **History** button:

1. From any screen within InSight, click the **History** button.

   A list of searches from the current session is displayed.



2. Select a search record from the list.

   The search results are displayed.

   Search records remain in the **History** drop-down list until InSight is exited, or the InSight screen is refreshed. The software also clears the search history if a new URL is entered in the address bar of the browser, or if the **Forward** or **Back** buttons of the browser are used.

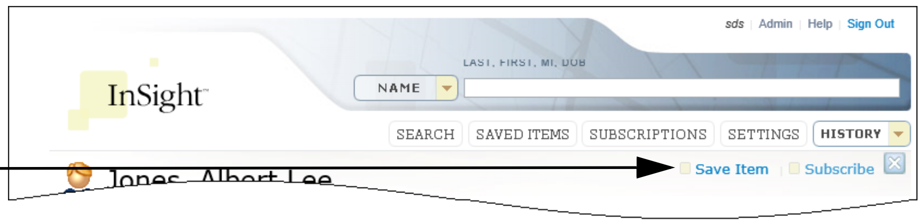
Saving an InSight Return

InSight returns can be saved to view at a later time, even if the return was saved during a previous session.

To save an InSight return:

1. From the search results, click the desired record.
2. Click the **Save Item** link.

Save Item link



A message stating the record is saved opens.

3. Click **OK** to return to the record.
4. To view a saved record, click the **Saved Items** button.

   The Saved Items screen opens and lists all InSight returns saved under the current username. The record is saved until it is removed manually from the Saved Items list.

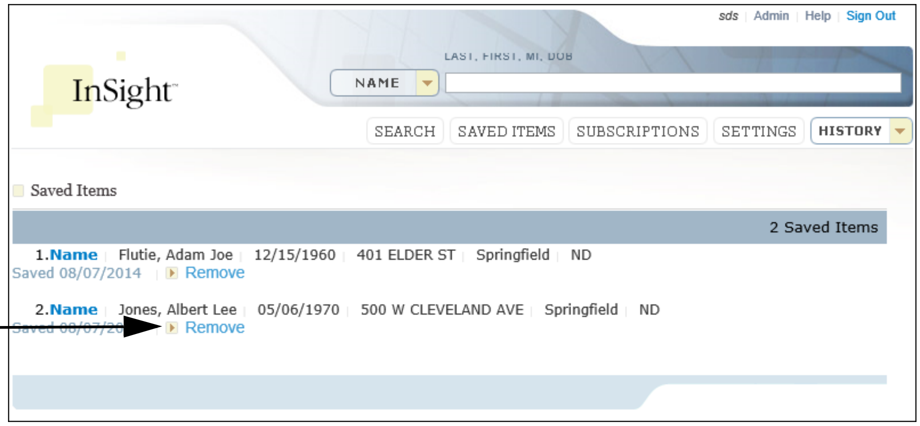
Removing a saved record

To remove a saved record:

1. From the InSight Search screen, click the **Saved Items** button.

The Saved Items screen opens, with the list of saved items displayed.

Remove link



2. Click the **Remove** link for the desired record.

   The selected record is removed from the list.

Subscribing to an InSight Return

To track how many times a record is viewed and which users viewed the record, subscribe to the record. Views to a record are called “hits.”

To subscribe to a record:

1. With the desired record open, click the **Subscribe** link.

   The Add Record Subscription dialog box opens.

2. In the **Subscribe for** field, select the number of days to subscribe to the record from the drop-down list.
3. Click **Save**.

   The subscription is saved and the Add Record Subscription dialog box closes.

Viewing subscribed records

To view currently subscribed records:

1. From any screen within InSight, click the **Subscriptions** button.

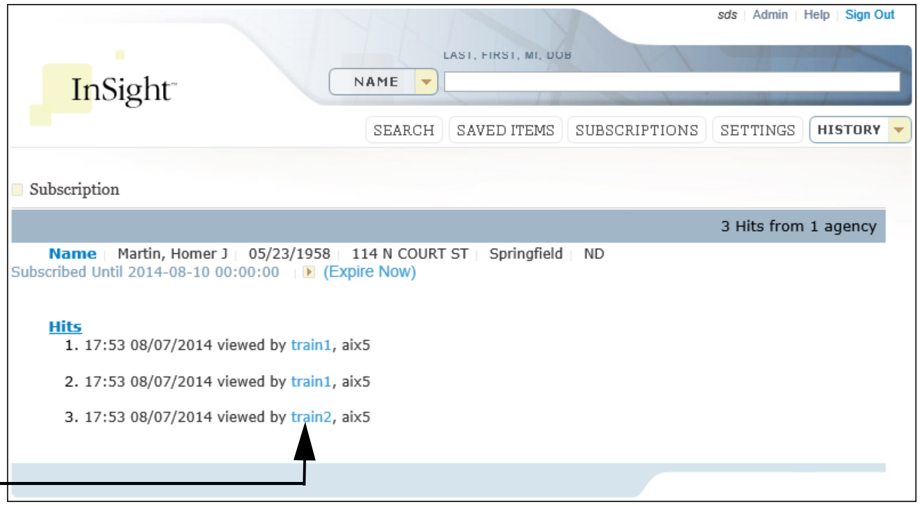
The Subscription Items screen opens.

The Subscription Items screen lists all the subscribed records for the current user. The number of hits and the subscription expiration date for each record are also listed.

2. To expire a subscription prior to its expiration date, do one of the following:
   – Click the **Expire All Subscriptions** link to remove all subscriptions from the list.
   – Click the **Expire Now** link for a specific record to remove it from the list.
3. To view the hits to the record since the last time the record was viewed by the subscriber, click the **Hits** link.

The subscription information and a list of hits for the record is displayed.

User link



4. To send an email to a user who has viewed the subscribed record, click the link for that user.

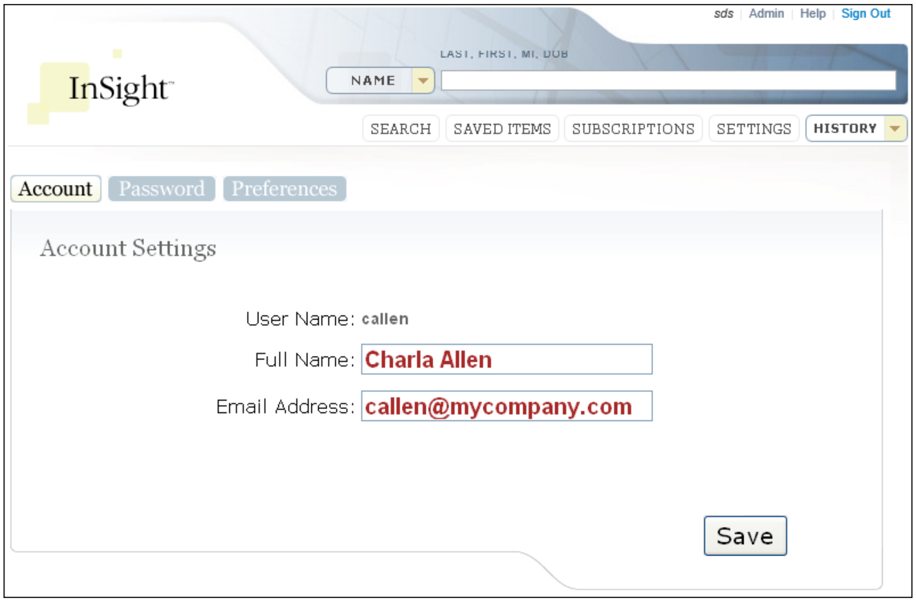
> **NOTE**
>
> The email program for the user needs to be set as the default program for the URL mailto extensions in the Windows Default Programs settings for this function to work properly. See your SAA for further assistance with emailing users.

The email program for the user opens with the selected user email address populated. The email can be composed and sent as usual.

5. To return to the list of subscribed records, click the **Subscriptions** button.

Changing InSight Settings

The Settings screen displays the current InSight settings and allows account information, InSight passwords, and default search preferences to be modified.



Changing account settings

The **Account** tab displays the username, full name, and email address of the current InSight user. The full name and email address of the user can be changed in this screen. However, InSight usernames cannot be changed.

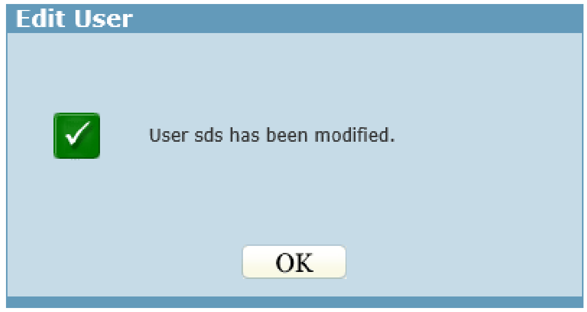
To change account settings:

1. From any screen within InSight, click the **Settings** button.

   The Settings screen opens to the **Account** tab.

2. Enter the changes for the account.
3. Click **Save**.

The Edit User message box opens.



4. Click **OK** to return to the **Account** tab.

Changing password settings

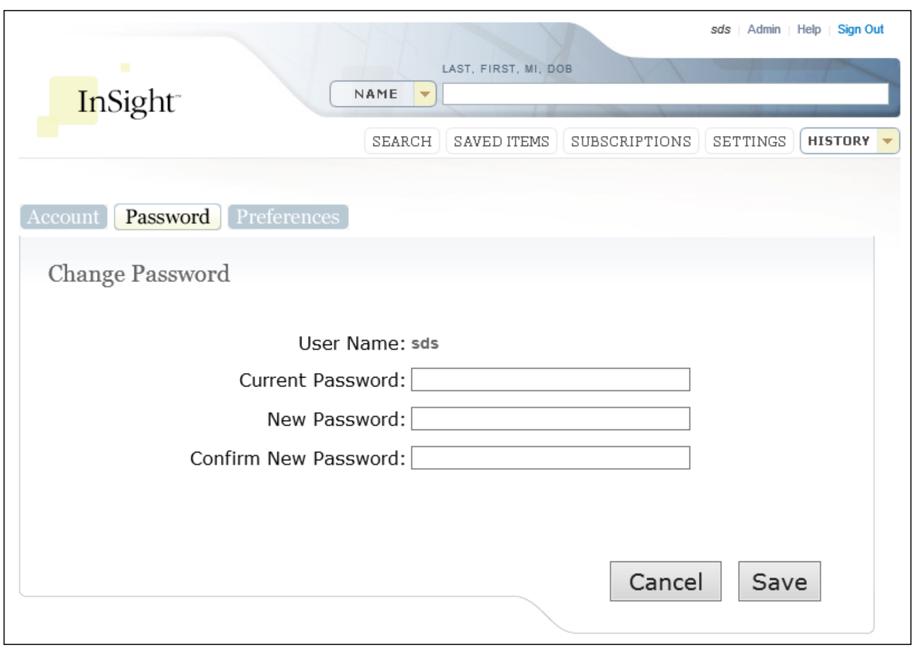
To change the password settings:

1. From any screen within InSight, click the **Settings** button.

   The Settings screen opens to the **Account** tab.

2. Click the **Password** tab.

   The Change Password screen opens.



3. Complete the following fields:

- **Current Password**: Enter the current password.
- **New Password**: Enter the new password.
- **Confirm New Password**: Re-enter the new password.

4. Click **Save**.

   One of the following occurs:

   - The Change Password message box opens stating that the password was changed successfully.
   - The Settings message box opens stating the error with the new password. Repeat steps 3–4 to correct the error.

5. Click **OK** to return to the Change Password screen.

Changing search preferences settings

Use the Search Preferences screen to set the default groups and agencies to be queried when an InSight search is performed.

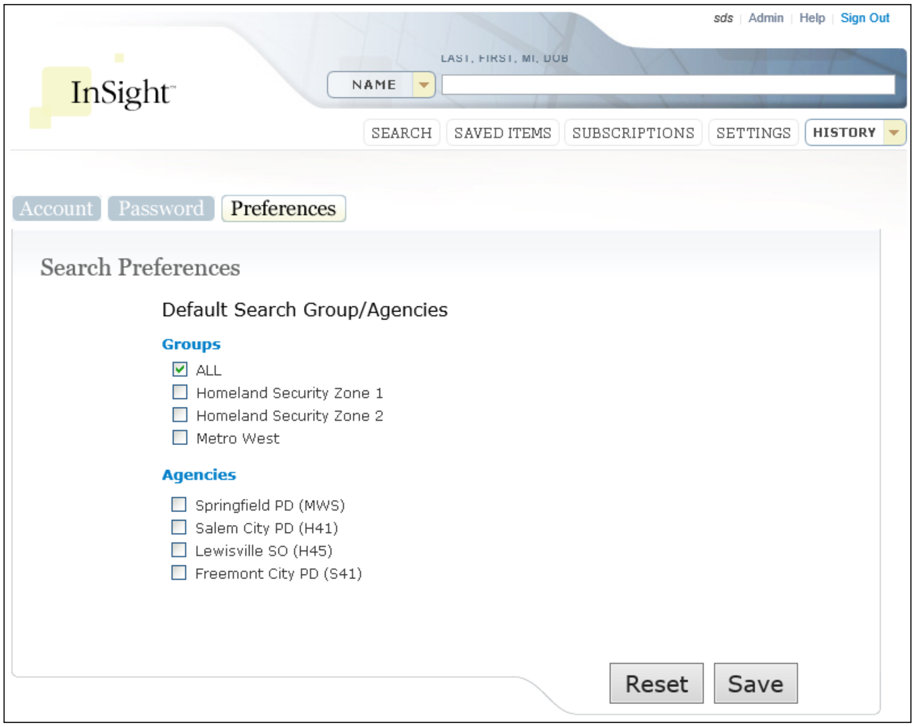
To change search preferences settings:

1. From any screen within InSight, click the **Settings** button.

   The Settings screen opens to the **Account** tab.

2. Click the **Preferences** tab.

The Search Preferences screen opens.



3. In the **Default Search Group/Agencies** area, select the check boxes for the groups and agencies to query by default when a search is performed.
4. Click **Save**.

   The Settings Preferences message box opens, stating that the settings have been modified.
5. Click **OK** to return to the Search Preferences screen.

Chapter 2

Administrator Information

Jump to topic:

Introduction

This chapter describes the administrative tasks that need to be completed to set up and maintain the InSight module.

The InSight module sends a query to a broker server that is configured to communicate with Spillman and non-Spillman agencies using an XML interface. The broker routes all queries and responses between the agencies.

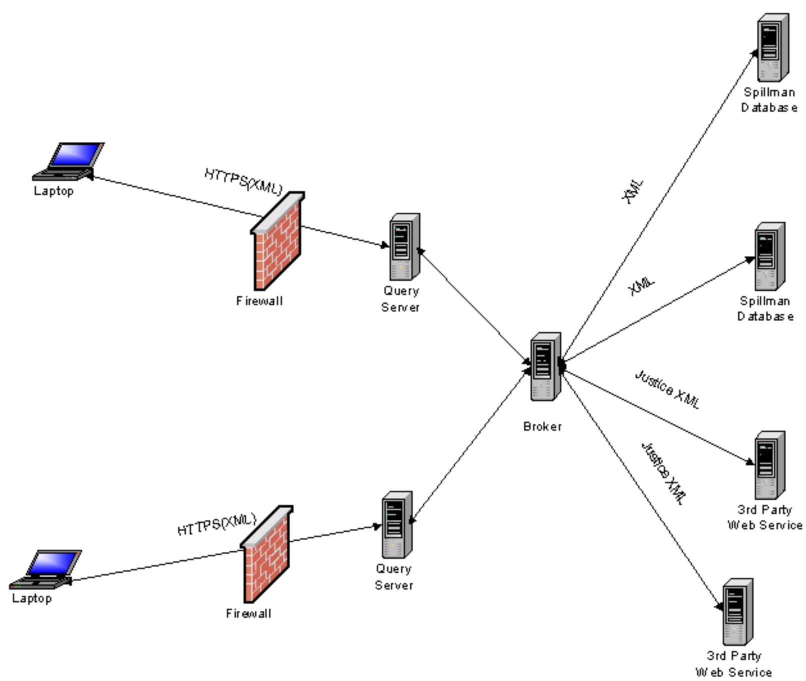
Agencies that use InSight query the broker through a client application, often referred to as the client. The client application is web-based, and can run off any computer with an Internet connection and Internet Explorer.

Non-Spillman agencies that host a Global Justice XML-based web service can be queried by InSight. The InSight broker needs to be configured to communicate with the databases of other agencies using a secure connection, and enable users to connect to the InSight broker through the client. For more information, see "Understanding Network Setup Requirements" on page 33.

NOTE

InSight uses the Global Justice XML Data Model (GJXDM), version 3.0. For more information on the model, see http://it.ojp.gov/jxdm/.

The following graphic illustrates how the InSight module works.



Understanding Network Setup Requirements

InSight uses wide-area network (WAN) interconnectivity between multiple agencies and users to provide access to shared data. The network must be able to provide the necessary connections from client computers to the broker, and from the broker to all participating remote agencies. When setting up InSight for initial use, Spillman Installation verifies all the necessary ports are open.

Your agency must select and set up one of the following network types:

- **Running InSight with Network Address Translation (NAT).** If the InSight broker or Spillman server is running behind NAT, then the client needs to be configured to connect to the NAT address used for the InSight broker and the NAT addresses of each Spillman server. Any Secured Sockets Layer (SSL) certificates on ports 443 and 9998 must be generated using the NAT address of the machine.
- **Running InSight with a Virtual Private Network (VPN).** If your agency has a VPN, then InSight can be run unencrypted so the SSL does not create excessive network traffic. However, the VPN must be verified to ensure CJIS requirements are met before disabling encryption within InSight.
- **Running InSight with proxies.** If your agency requires users to access the network through a proxy, then set up the proxy to the InSight broker on the ports specified in the following sections:
  - "Understanding required client-broker connections" on page 34
  - "Understanding required broker connections" on page 34
  - "Understanding bandwidth requirements" on page 35

  The Query and Response port requires a proxy that is capable of proxying SSL connections. Verify the connectivity for your users to the proxy by entering the following URL in their Internet Explorer address bar:

  https://*your.InSight.server*/InSight

  where *your.InSight.server* is the IP address for your server.

> **NOTE**
>
> Configure the firewall for your agency to allow all ports InSight uses.

Understanding required client-broker connections

For InSight to operate properly, the following ports must be opened between the broker and the client:

- **The Notify port.** This port is established on Transmission Control Protocol (TCP) port 4445, and is initiated by the client. This port provides a connection to the Notify daemon, which is responsible for notifying the client when search data becomes available. The persistent connection to the broker remains open while the client is operating. Although this port does not utilize encryption, no sensitive data is passed.
- **The Query and Response port.** This port is established on TCP port 443, is initiated by the client, and is a non-persistent connection. All data traffic on this port is encrypted with Secure Sockets Layer (SSL) Advanced Encryption Standard (AES) to meet CJIS encryption requirements. New searches are submitted to this port, and search data is also retrieved via this port.

NOTE

The port numbers are set by default. If they need to be changed, then contact Spillman Technical Services.

Understanding required broker connections

The broker must have the following connections open to each Spillman or non-Spillman server to query and retrieve data:

- **XML Query port.** The broker server must be able to contact the remote XML Query daemon for the agency operating on TCP port 9998. The broker establishes a connection to each remote agency, and each connection is non-persistent. The XML query port also uses SSL AES.
- **Broker-to-broker connections.** Broker-to-broker connections are non-persistent SSL connections that use TCP port 443. Each broker must be able to initiate this connection to every other broker within the InSight network.
- **Broker administration connection.** The person who administers a broker must be able to contact TCP port 80 (HTTP) to run the administration utility. To avoid firewall concerns, run this utility on the

local area network (LAN) or directly from the broker server through a web browser.

> **NOTE**
> During initial setup, Spillman IT or Technical Services technicians require remote SSH (SSL secure shell) access to the broker server via TCP port 22.

Understanding bandwidth requirements

The following table shows the bandwidth requirements for InSight.

Functions	Path	Size of payload	Size on wire
Authentication	client↔broker	162 bytes	1,036 bytes
Login	client↔broker	5,122 bytes	8,648 bytes
Search	client↔broker	3,110 bytes	3,744 bytes
Search	broker↔agency*	2,770 bytes	4,637 bytes
Detail	client↔broker	14,753 bytes	16,207 bytes
Detail	broker↔agency	13,705 bytes	16,858 bytes
*For each agency in the InSight network.			

Using the InSight Administrator Tool

The InSight Administrator Tool is accessed through Internet Explorer. The InSight Administrator Tool is a secure site that can be accessed only from within the network for your agency. Use the InSight Administrator Tool to view log files, and to add and manage the following:

- Servers
- Users
- Administrators
- Brokers
- Agencies
- Groups
- Certificates

To access the InSight Administrator Tool:

1. Open Internet Explorer, and in the address bar, enter the following URL:

   `http://`*`insightbroker.gov`*`/admin`

   where *insightbroker.gov* is the client URL for your agency.

2. Add the InSight Administrator Tool to Compatibility View in your Internet settings to ensure the program runs correctly.

   To add InSight to Compatibility View:

   – In Internet Explorer, select **Tools** > **Compatibility View settings**.

     The Compatibility View Settings dialog box opens, and the InSight URL is populated in the **Add this website** field.

   – Click the **Add** button.

> **NOTE**
>
> If the URL has already been added to Compatibility View, then it is displayed in the **Websites you've added to Compatibility View** field.

   – Click the **Close** button.

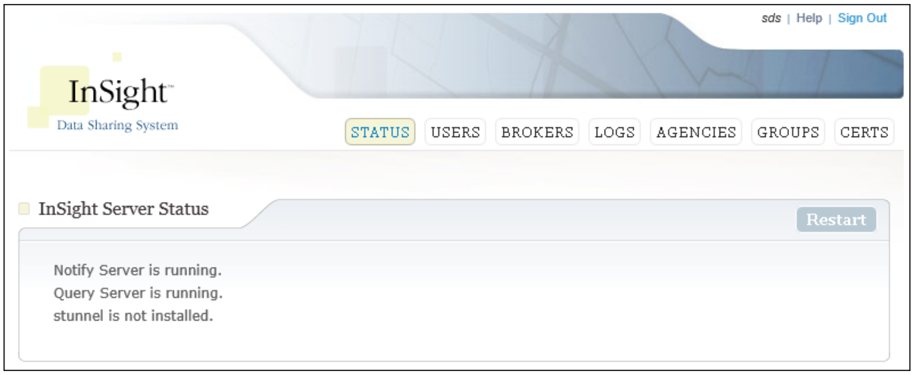
     The Compatibility View Settings dialog box closes.

3. From the InSight Admin login screen, in the **User Name** field, enter your username.

4. In the **Password** field, enter your password.

5. Click **Sign In**, or press Enter.

   The InSight Administrator Tool opens.



The InSight Administrator Tool contains the following buttons:

- **Status.** Used to display the current server status. For more information, see "Using the Status screen" on page 38.

> **NOTE**
>
> If your agency uses a stunnel program, then the connection status is displayed. If your agency does not use stunnel, then the message `stunnel is not installed` is displayed. Refer to your stunnel documentation for more information.
>
> If the Notify server or Query server are not running, then contact Spillman Technical Services for assistance.

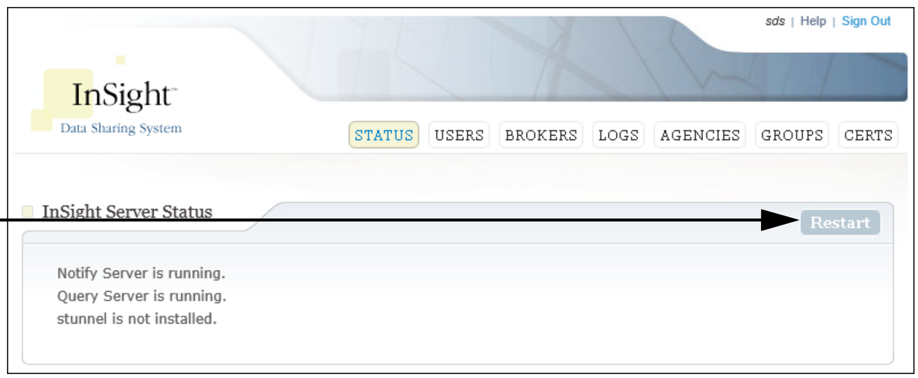
- **Users.** Used to display a list of current users, and to add, modify, or delete users. For more information, see "Using the Users screen" on page 39.
- **Brokers.** Used to display a list of the brokers installed, and to add, modify, or delete brokers. For more information, see "Using the Brokers screen" on page 42.
- **Logs.** Used to display the Broker Transaction Log file. For more information, see "Using the Broker Transaction Log File screen" on page 46.
- **Agencies.** Used to display a list of the agencies installed, and to add, modify, or delete agencies. For more information, see "Using the Agencies screen" on page 48.

- **Groups.** Used to display a list of any groups that have been created, and to add, modify, or delete groups. For more information, see “Using the Groups screen” on page 53.
- **Certs.** Used to access the InSight Certificate Manager. The InSight Certificate Manager displays any security certificates that the server uses. If your agency uses stunnel, then the stunnel license is displayed. For more information, see “Using the Certs screen” on page 55.

Using the Status screen

The Status screen opens after logging in to the InSight Administrator Tool. The Status screen shows the status of each server in the InSight network and a list of clients currently connected to InSight.

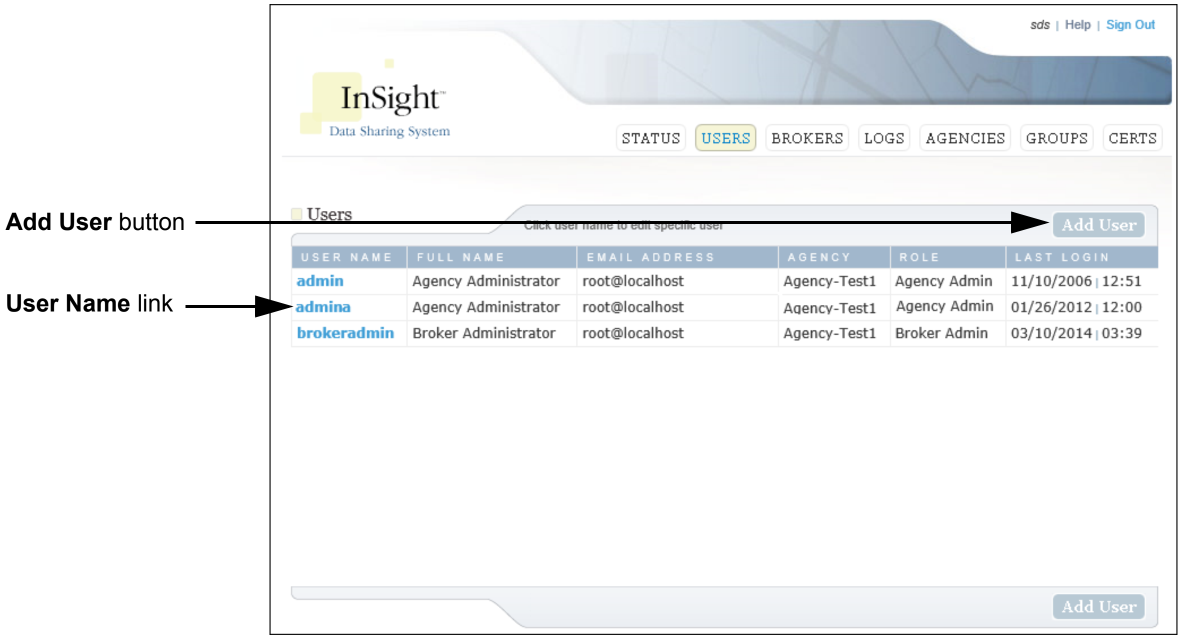
Click the **Restart** button to stop and immediately restart all InSight servers.



Restart button

Using the Users screen

The Users screen lists all the users within the InSight network for your agency. From the Users screen, users, agency administrators, and broker administrators can be added, modified, or deleted.

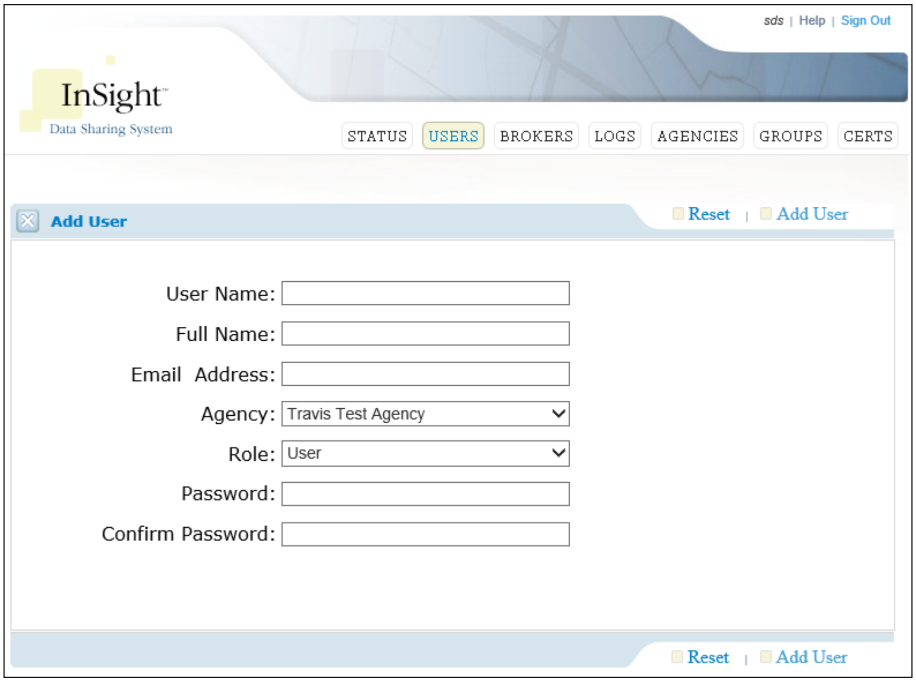


Adding a user

To add a user:

1. Click the **Add User** button.

The Add User screen opens.



2. Complete the following fields:

– **User Name**: Create the username that will be displayed on all the InSight screens and used to log in to InSight. The username cannot have any spaces or special characters.

NOTE

Once created, the InSight username cannot be changed.

– **Full Name**: If desired, enter the full name for the user.

– **Email Address**: If desired, enter an email address for the user. This email address can be changed by the user after the first log in. For more information, see "Changing account settings" on page 26.

– **Agency**: Select the agency to which the user belongs from the drop-down list.

– **Role**: Select the role of the user from the drop-down list.

– **Password**: Create an initial password for the user. This password can be changed by the user after the first log in. For more information, see "Changing password settings" on page 27.

– **Confirm Password**: Re-enter the password.

3. Click **Add User**.

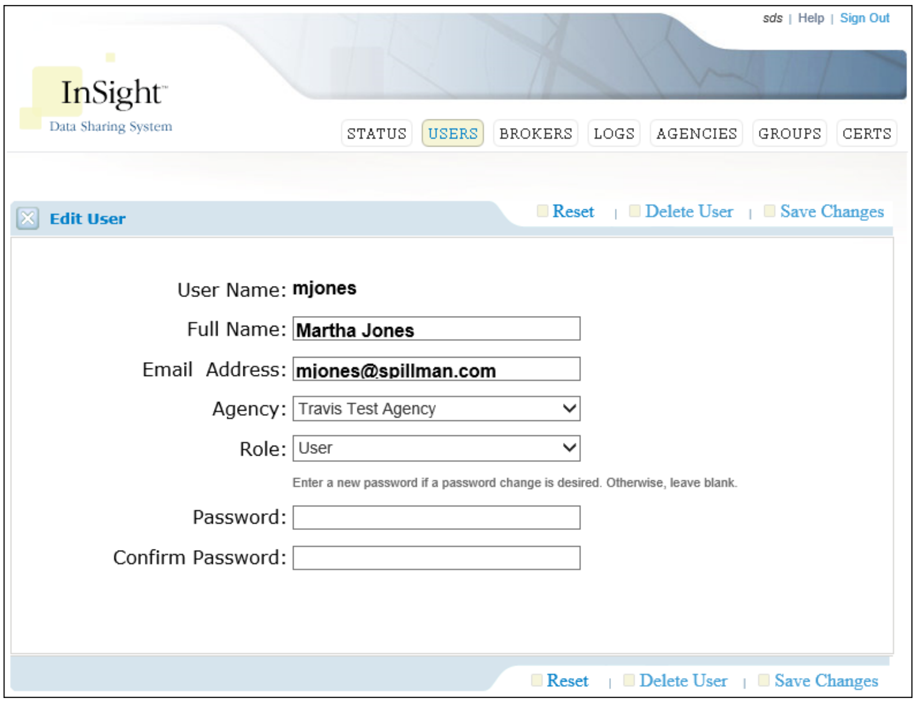
   The new user is saved and the Users screen opens.

Editing a user

To edit a user:

1. Click the **User Name** link.

   The Edit User screen opens.



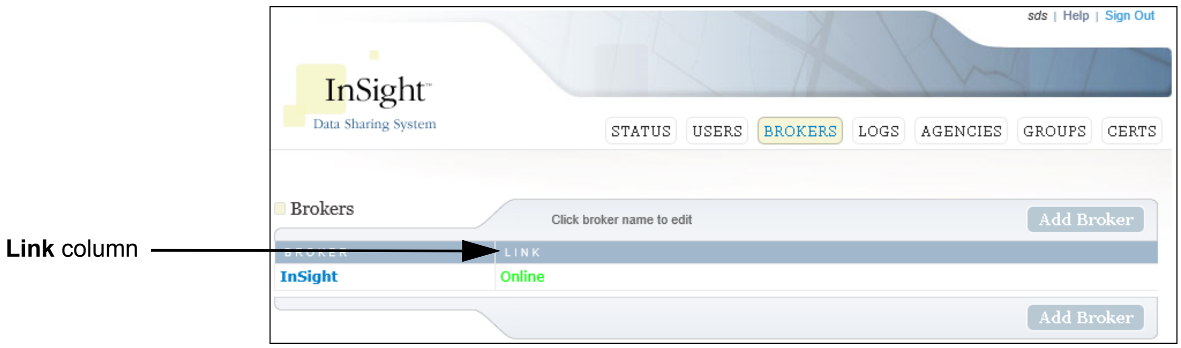
2. Edit the fields, as necessary. For field descriptions, see “Adding a user” on page 39.
3. To undo changes that have not been saved, click the **Reset** link.

   The user profile reverts to its original state, and the InSight Server Status screen opens.
4. To delete the user, click the **Delete User** link.

   The user is deleted from InSight and the Users screen opens.
5. Click the **Save Changes** link to save the edits and return to the Users screen.

Using the Brokers screen

The Brokers screen lists all the brokers within your InSight network. The **Link** column shows the status of the connection.

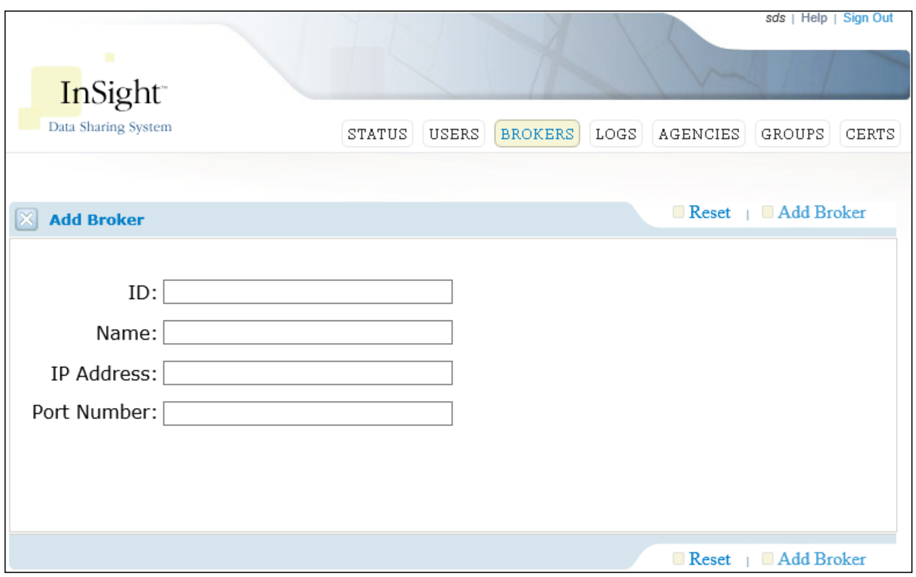


Adding a broker

To add a broker:

1. Click the **Add Broker** button.

   The Add Broker screen opens.



2. Complete the following fields:

- **ID**: Create the ID for the broker. The ID cannot have any spaces or special characters.

> **NOTE**
>
> Once created, the broker ID cannot be changed.

- **Name**: Select the name your agency uses to identify the broker.
- **IP Address**: Enter the IP Address for the server for the broker.

> **NOTE**
>
> Brokers can be set up within your agency, or by outside companies. For a broker set up within your agency, the IP address can be obtained from your network. For brokers set up with an outside company, contact the company for assistance obtaining an IP address.

- **Port Number**: Enter the desired port for connecting to the broker server.

3. Click **Add Broker**.

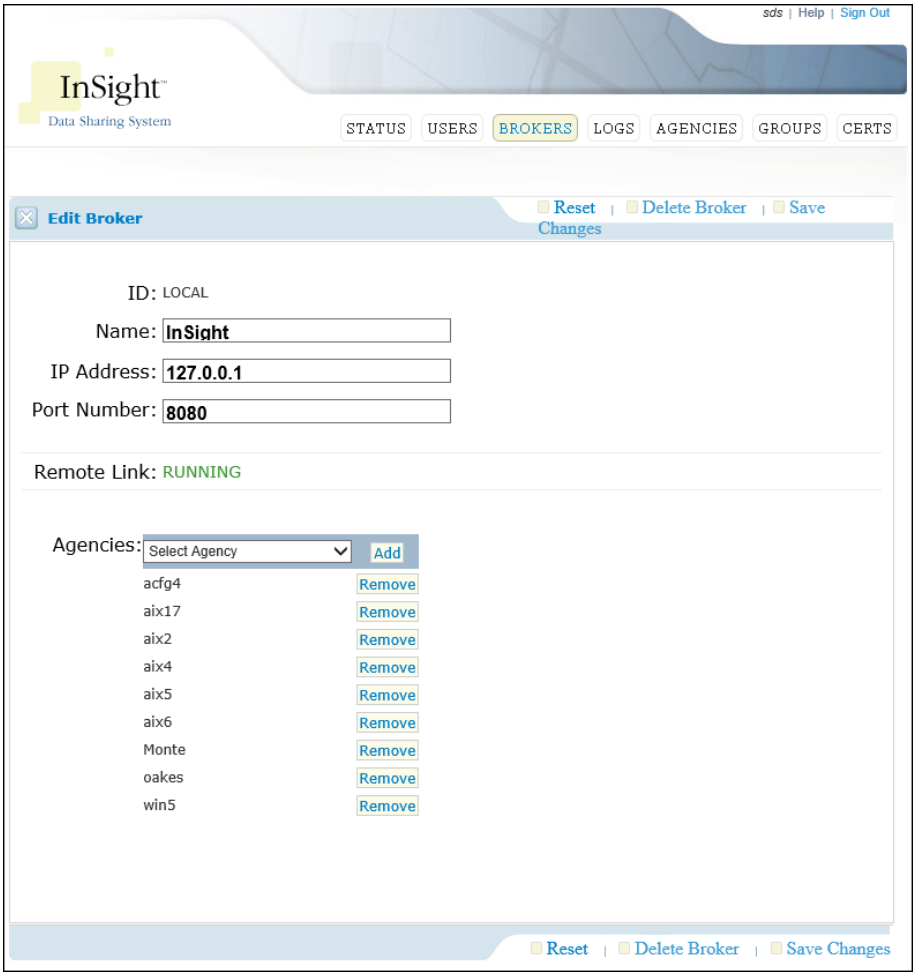
   The broker is saved and the Brokers screen opens.

Modifying or deleting a broker

To modify or delete a broker:

1. From the Brokers screen, click the broker name.

The Edit Broker screen opens.



2. Edit the fields, as necessary. For field descriptions, see "Adding a broker" on page 42.
3. In the **Agencies** field, do one of the following:
   - To add agencies connected to the broker, select the agency from the drop-down list, and then click the **Add** button.
   - To remove agencies from the broker, click the **Remove** button next to the name of the agency.
4. To undo changes that have not been saved, click the **Reset** link.

   The broker profile reverts to its original state, and the InSight Server Status screen becomes active.
5. To delete the broker, click the **Delete Broker** link.

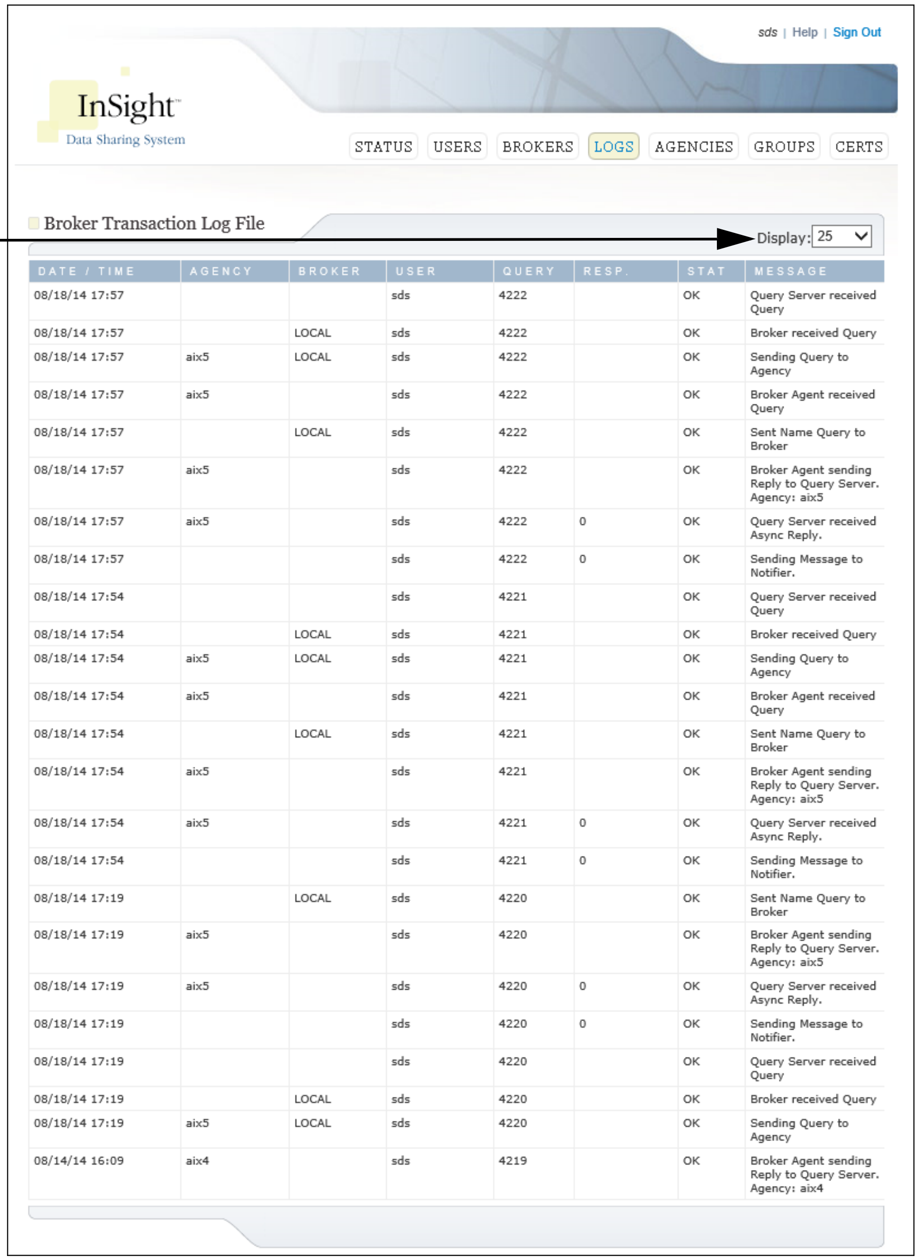
The broker is deleted from InSight and the Brokers screen opens.

6. Click the **Save Changes** link to save the edits and return to the Brokers screen.

Using the Broker Transaction Log File screen

The Broker Transaction Log File screen lists all the broker transaction logs. By default, the screen shows the last 100 entries, with the most recent listed first. To change the number of entries shown on the screen, in the **Display** field, select a value from the drop-down list.

Display field



DATE / TIME	AGENCY	BROKER	USER	QUERY	RESP.	STAT	MESSAGE
08/18/14 17:57			sds	4222		OK	Query Server received Query
08/18/14 17:57		LOCAL	sds	4222		OK	Broker received Query
08/18/14 17:57	aix5	LOCAL	sds	4222		OK	Sending Query to Agency
08/18/14 17:57	aix5		sds	4222		OK	Broker Agent received Query
08/18/14 17:57		LOCAL	sds	4222		OK	Sent Name Query to Broker
08/18/14 17:57	aix5		sds	4222		OK	Broker Agent sending Reply to Query Server. Agency: aix5
08/18/14 17:57	aix5		sds	4222	0	OK	Query Server received Async Reply.
08/18/14 17:57			sds	4222	0	OK	Sending Message to Notifier.
08/18/14 17:54			sds	4221		OK	Query Server received Query
08/18/14 17:54		LOCAL	sds	4221		OK	Broker received Query
08/18/14 17:54	aix5	LOCAL	sds	4221		OK	Sending Query to Agency
08/18/14 17:54	aix5		sds	4221		OK	Broker Agent received Query
08/18/14 17:54		LOCAL	sds	4221		OK	Sent Name Query to Broker
08/18/14 17:54	aix5		sds	4221		OK	Broker Agent sending Reply to Query Server. Agency: aix5
08/18/14 17:54	aix5		sds	4221	0	OK	Query Server received Async Reply.
08/18/14 17:54			sds	4221	0	OK	Sending Message to Notifier.
08/18/14 17:19		LOCAL	sds	4220		OK	Sent Name Query to Broker
08/18/14 17:19	aix5		sds	4220		OK	Broker Agent sending Reply to Query Server. Agency: aix5
08/18/14 17:19	aix5		sds	4220	0	OK	Query Server received Async Reply.
08/18/14 17:19			sds	4220	0	OK	Sending Message to Notifier.
08/18/14 17:19			sds	4220		OK	Query Server received Query
08/18/14 17:19		LOCAL	sds	4220		OK	Broker received Query
08/18/14 17:19	aix5	LOCAL	sds	4220		OK	Sending Query to Agency
08/14/14 16:09	aix4		sds	4219		OK	Broker Agent sending Reply to Query Server. Agency: aix4

Columns on the Broker Transaction Log File screen

The following lists the columns on the Broker Transaction Log File screen.

> **NOTE**
> The columns on the Broker Transaction Log File screen are view-only.

`Date/Time`

Displays the date and time the transaction occurred.

`Agency`

Displays the name of the agency that sent or received the transaction.

`Broker`

Displays the name of the broker involved in the transaction.

`User`

Displays the username for the user who initiated the transaction.

`Query`

Displays a unique identifier for each query.

`Resp.`

Displays the Response ID for the broker.

`Stat`

Displays the status of the transaction.

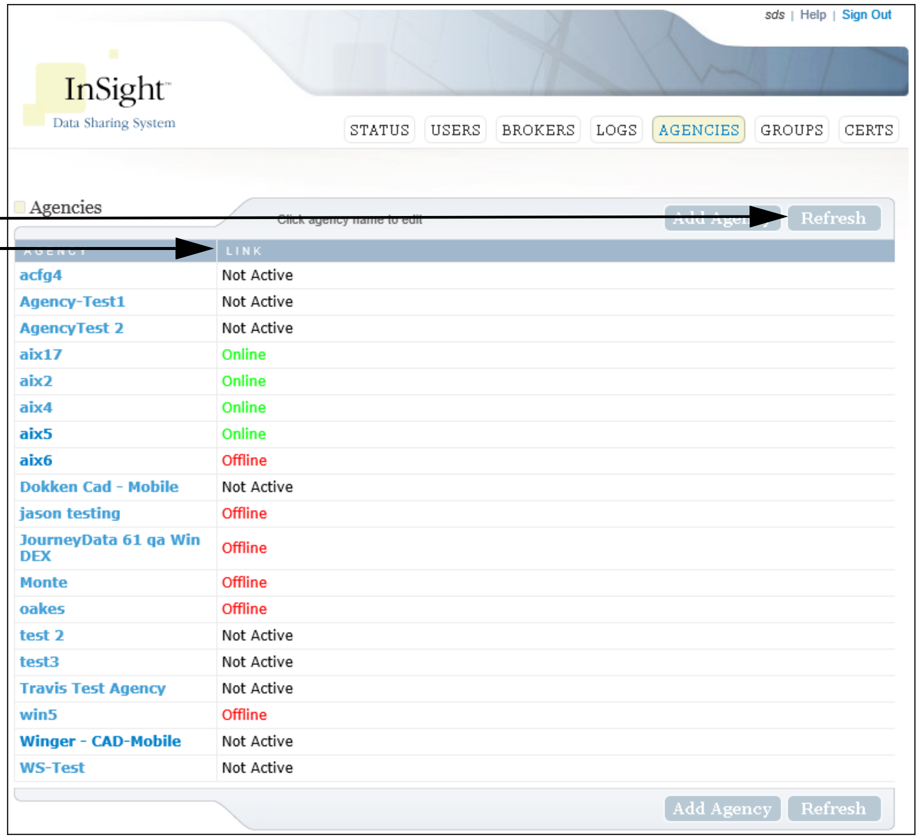
`Message`

Displays a message stating what happened during the transaction.

Using the Agencies screen

The Agencies screen lists all agencies within the InSight network for your agency. The status of the connection is displayed in the **Link** column. To refresh the agency information on the screen, click the **Refresh** button.

Refresh button
Link column

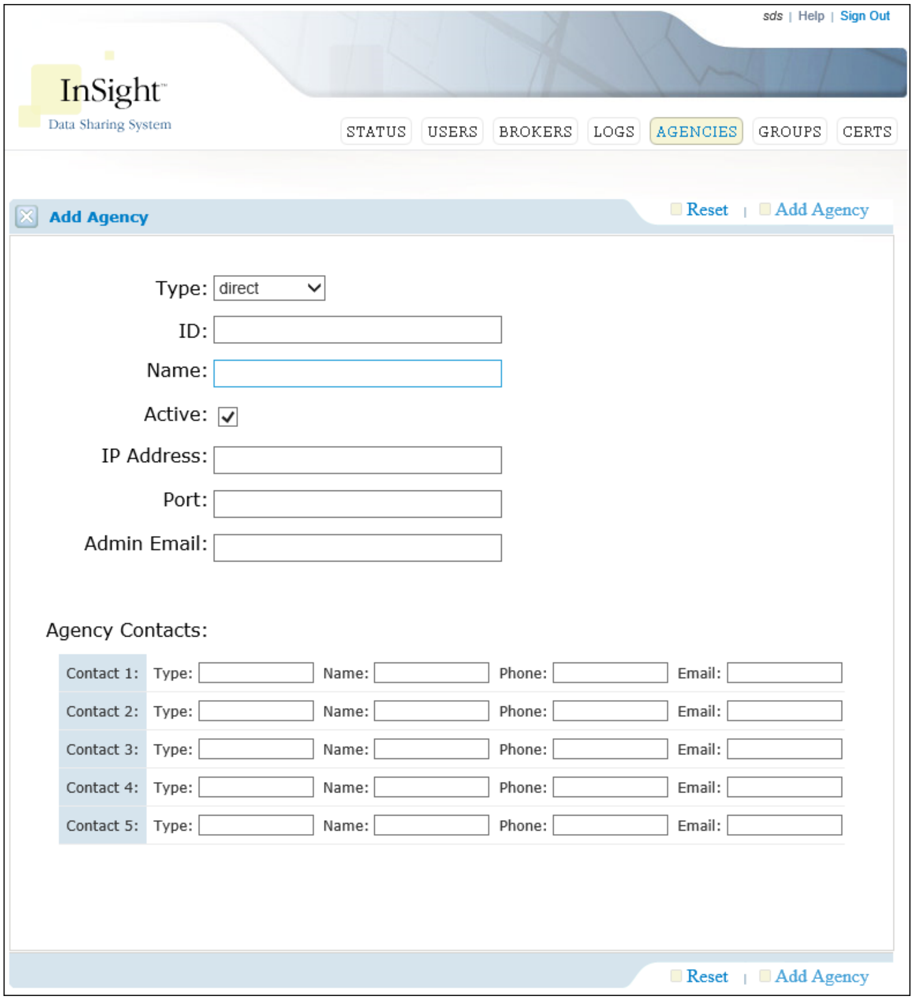


Adding an agency

To add an agency:

1. Click the **Add Agency** button.

The Add Agency screen opens.



2. Complete the following fields:
   - **Type**: Select the type of connection the agency makes to the broker from the drop-down list.
   - **ID**: Create an ID for the agency. The ID is displayed on all InSight screens, and cannot have any spaces or special characters.

NOTE

Once created, the agency ID cannot be changed.

   - **Name**: Enter the name of the agency.

- **Active** check box: Select or clear the check box. If selected, the agency receives alerts. If cleared, the agency is still added to the server, but does not receive alerts.
- **IP Address**: Enter the IP address of the server for the agency.
- **Port**: Enter the desired port to use to connect to the agency.
- **Admin Email**: Enter the email address for the administrator for the agency.
- **Agency Contacts** area: Enter the contact information for the administrator for the agency and any contacts at the agency.

3. Click **Add Agency**.

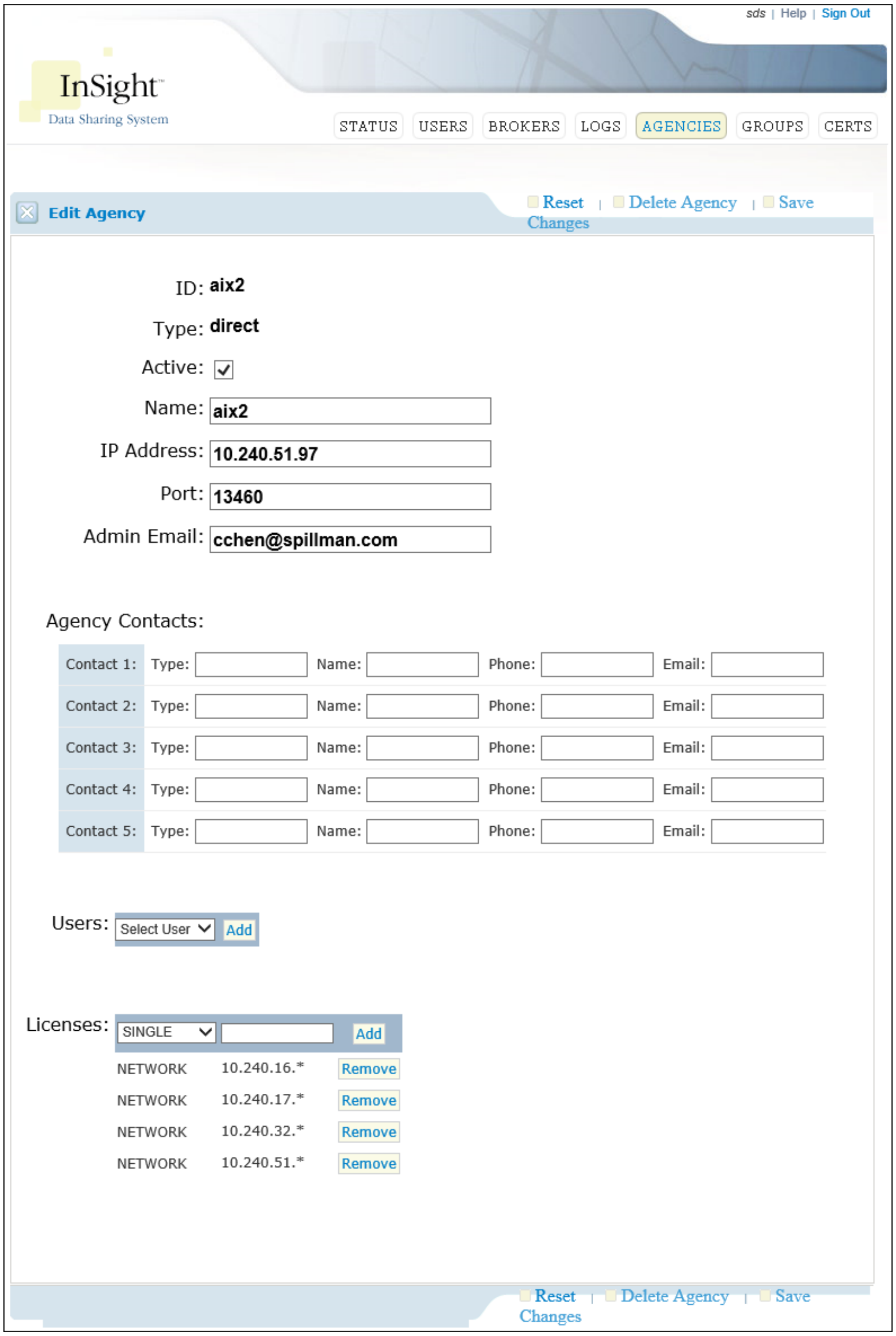
   The agency is saved, and the Agencies screen opens.

Modifying or deleting an agency

To modify or delete an agency:

1. From the Agencies screen, click an agency name.

The Edit Agency screen opens.



2. Edit the fields, as necessary. For field descriptions, see “Adding an agency” on page 48.
3. In the **Agency Contacts** area, do one of the following:

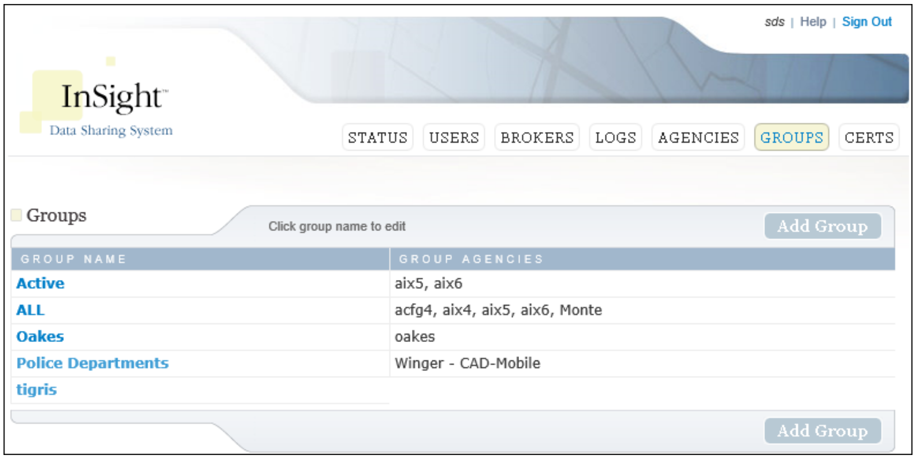
   - Add agency contacts by entering contact information in each field.
   - Edit or remove agency contacts by clearing or modifying the information in each field.
4. In the **Users** area, do one of the following:
   - Add users by selecting a user from the **Users** field and clicking **Add**.
   - Remove users by clicking **Remove** next to the name of the user.
5. In the **Licenses** area, do one of the following:
   - Add licenses by selecting the license type from the **Licenses** field, entering the IP address in the empty field, and then clicking **Add**.
   - Remove licenses by clicking **Remove** next to the license name. The Licenses feature allows agencies to define which outside agencies can query the server.
6. To undo changes that have not been saved, click the **Reset** link.

   The agency profile reverts to its original state, and the InSight Server Status screen opens.
7. To delete the agency, click the **Delete Agency** link.

   The agency is deleted from InSight and the Agencies screen opens.
8. Click the **Save Changes** link to save the edits and return to the Agencies screen.

Using the Groups screen

The Groups screen lists the agency groups that have been created for the broker.

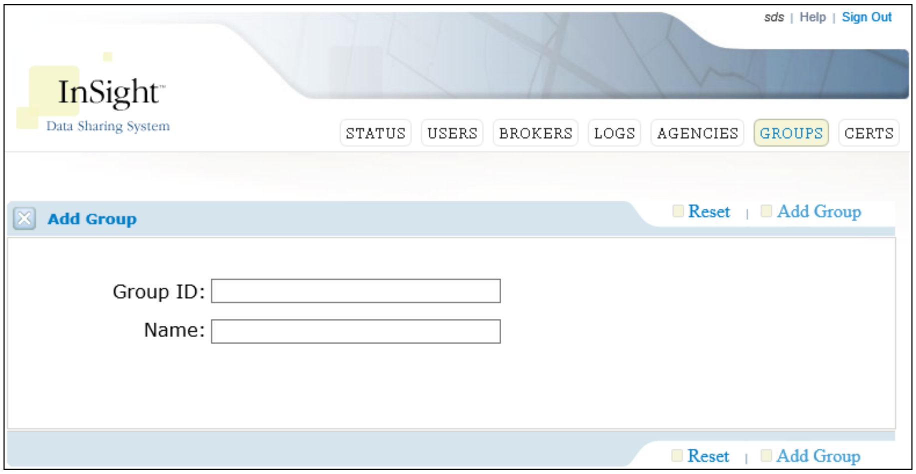


Adding a new group

To add a new group:

1. Click the **Add Group** button.

   The Add Group screen opens.



2. Complete the following fields:

– **Group ID:** Create the ID for the group. The ID cannot have any spaces or special characters.

> **NOTE**
>
> Once created, the group ID cannot be changed.

– **Name**: Select the name to be displayed on the InSight screens. The name should describe the group.

3. Click **Add Group**.

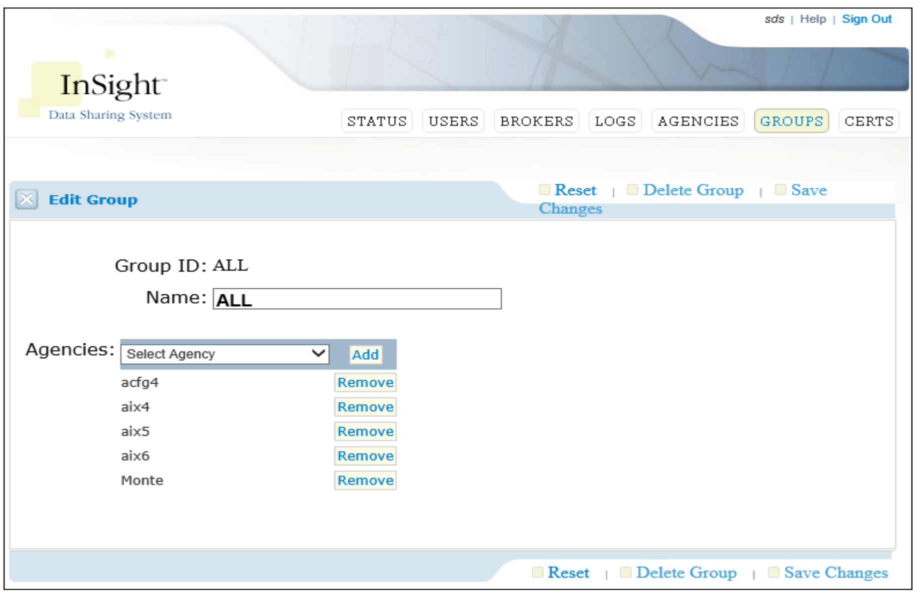
   The group is saved and the Groups screen opens.

Modifying or deleting a group

To modify or delete a group:

1. From the Groups screen, click the name of the group.

   The Edit Group screen opens.



2. Edit the fields, as necessary. For field descriptions, see “Adding a new group” on page 53.
3. In the **Agencies** area, do one of the following:

   – Add an agency to the group by selecting an agency from the **Agencies** field and clicking the **Add** button.

   – Remove an agency from the group by clicking the **Remove** button next to the name of the agency.

4. To undo changes that have not been saved, click the **Reset** link.

   The group profile reverts to its original state, and the InSight Server Status screen opens.

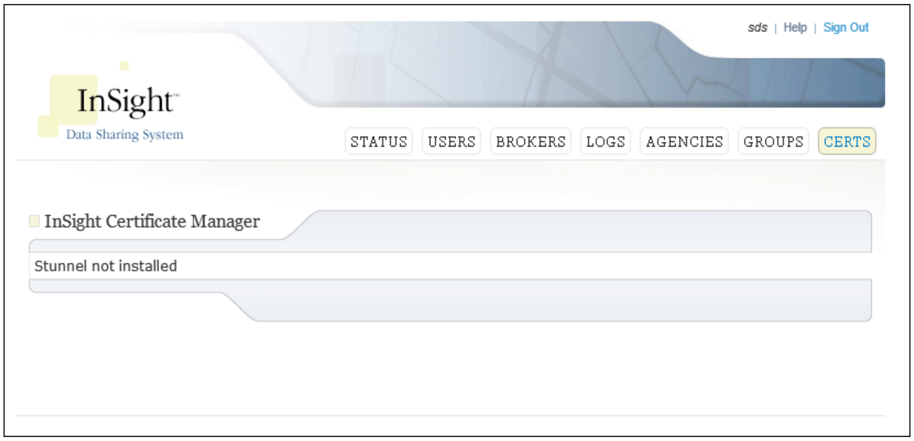
5. To delete the group, click the **Delete Group** link.

   The group is deleted from InSight and the Agencies screen opens.

6. Click the **Save Changes** link to save the edits and return to the Agencies screen.

Using the Certs screen

The Certs screen displays information for current certificate configurations, including the stunnel certificate.



NOTE

Spillman does not manage certificates. For more information, contact your network administrator.

Setting Up InSight System Privileges

The following table lists the user privilege that must be set up in the System Privileges table (`sypriv`) to allow users to perform queries from InSight and receive responses from Spillman and non-Spillman databases.

Setting	Description	Privilege
`mdcmdlinsight`	Used to perform queries from the InSight Name, Property, or Vehicle Search screens and receive responses from Spillman and non-Spillman databases. The software places the returns in the **InSight Returns** folder in the Message Center.	Access

For more information on setting user privileges, see the *Security Setup and Maintenance Manual*.